

ABSTRACT

A system, method, and article of manufacture provide a computer assisted method for providing for assisting in providing configuration and sales information for the development of insurance plans for a customer. The method collects customer data within a sales
5 computer system, stores the customer data within a database on the sales computer system, and presents a description of the insurance plan options available based upon the customer data. Based upon this presented data, the customer or salesperson selects a preferred set of insurance plans from the available insurance plan options and determining an estimated cost for the preferred set of insurance plans; and generates a customized proposal for the preferred
10 set of insurance plans, including the customer data, the description of the preferred insurance plans, and the estimated costs for the preferred set of insurance plans.